

TO: ALL COUNTY PERSONNEL

FROM: ROBERT WEISMAN
COUNTY ADMINISTRATOR

PREPARED BY: OFFICE OF FINANCIAL MANAGEMENT AND BUDGET
(OFMB)

SUBJECT: OFMB REVIEW OF FORMAL CONTRACTS
AND REQUESTS FOR PROPOSALS

PPM # CW-O-065

ISSUE DATE

May 29, 2015

EFFECTIVE DATE

May 29, 2015

PURPOSE:

To ensure that the Office of Financial Management & Budget has participated in the preparation of or review of all formal contracts and Requests for Proposal (RFPs) prior to their execution or issuance.

All formal contracts and RFPs developed by the Purchasing Department and other authorized Departments shall be reviewed during the front end development by the Office of Financial Management & Budget/Contract Development and Control Division (OFMB/CDC) prior to distribution, advertisement and execution of said documents.

UPDATES:

Future updates to this PPM are the responsibility of the Director of Financial Management & Budget Department.

AUTHORITY:

- Palm Beach County Administrative Code Section 307.00.

DEFINITIONS:

1. Formal Contract means the existence of a formal, written contract document requiring the signature of two or more parties.
2. Request for Proposal (RFP) means a solicitation of responses for goods and/or services for which the evaluation of a proposal is based on prior established criteria which may include, but is not limited to, price.

POLICY:

All formal contracts and RFPs developed by the Purchasing Department and other authorized Departments shall be reviewed during the front end development by the Office of Financial Management & Budget/Contract Development and Control Division (OFMB/CDC) prior to distribution, advertisement and execution of said documents.

PROCEDURES:

To implement the aforementioned policy, the following procedures must be followed:

1. The Purchasing Department and other authorized Departments shall submit all formal contracts and RFPs during preparation to OFMB/CDC or for review and comment prior to distribution, advertisement and execution of said document. All items submitted to OFMB/CDC must have an accompanying cover memo identifying the item with a space provided for comments.
2. OFMB/CDC will assist in the preparation of or review and return comments pertaining to a submitted item within five business days. Under extenuating circumstances, the Director of Purchasing or the Director of authorized Departments may request an expedited review of items deemed to require such a review period.
3. OFMB/CDC will submit draft materials or written comments pertaining to an item within five business days after receipt of the item. If there are extenuating circumstances that require an extended time, the Director of OFMB/CDC will notify the Purchasing Department, or other authorized Departments.
4. The Purchasing Department, other authorized Departments and OFMB/CDC shall be responsible for logging/monitoring items that were sent for preparation or review or returned after preparation or review, respectively.
5. OFMB/CDC will maintain a record of prepared drafts, comments or recommendations made in relation to all items within this PPM.
6. OFMB/CDC shall become involved in the preliminary drafting and preparation of formal contracts and RFPs upon the request of the Purchasing Department or other authorized Departments.



ROBERT WEISMAN
COUNTY ADMINISTRATOR

Supersession History:

1. PPM #CW-O-065, dated 2/1/98
2. PPM #CW-O-065, dated 11/1/10